



# FREDERICK COUNTY, MARYLAND

## Procurement and Contracting Department

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October 12, 2012

RFP No. 13-10

### Development of the Challenge Live Interactive Website For the Green Homes Challenge Program

#### Addendum #1

The following information is incorporated into RFP No. 13-10 as identified above by way of reference. Please sign and date this sheet in the spaces provided below to acknowledge receipt of this Addendum #1 and submit it with your proposal. Except as provided herein, all terms and conditions of RFP No. 13-10 remain unchanged and in full force and effect.

The following questions below were received from vendors with the answers.

Q1. Can companies from Outside the USA apply for this? (From India or Canada)

**A1. This project is being funded by the Recovery Act, Whose purpose is to stimulate the US economy so only U.S. Companies will be awarded.**

Q2. Do we need to come over there for meetings?

**A2. If the contractor is not local, phone and/or televised conferences can be arranged.**

Q3. Can we perform the tasks outside the USA? (From India or Canada)

**A3. No, see answer to question #1.**

Q4. On page 19, paragraph 8.3 says: "Contractor's proposal shall be presented in the Order specified in Paragraphs 8.1.1 and 8.1.2.8 above to assure a uniform review process and obtain the maximum degree of comparability." However, paragraph 8.1.1 does not specify a proposal order, and there is no paragraph 8.1.2.8. Is that the proposal order to which we should adhere?

**A4. The Contractor's proposal order should be followed from Section 8 through Section 8.1.2.7. because there is no Section 8.1.2.8.**

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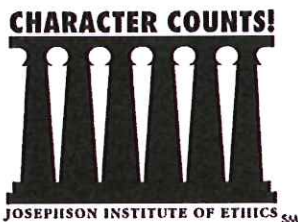
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CHARACTER COUNTS! and the Six  
Pillars of Character are service  
marks of the CHARACTER  
COUNTS! Coalition, a project of the  
Josephson Institute of Ethics.  
[www.charactercounts.org](http://www.charactercounts.org)

Q5. Is this Challenge Live Interactive Website intended to replace the existing website or be an extension of the existing website via a link from the existing website?

**A5. Once the Challenge Live website is completed, much of the Green Homes Challenge related content will be removed from the existing Frederick County Green Homes Challenge web pages. There may still be a page or two on the Frederick County website with basic information about the Green Homes Challenge and a link to the Challenge Live website.**

Q6. Is there a preferred CMS that the organization would like to use?

**A6. No, there is not a preferred Content Management System. However, vendors should consider the impact that the CMS may have on the ease of site maintenance required of OSER staff to make minor updates to the website after completion of the contract.**

Q7. How many focus groups will there be for the usability assessment? What is the anticipated sample size of said focus groups?

**A7. There will be at least two focus groups we anticipate will range from 10-25 people, depending on interest. In addition there will be website usability testing performed by OSER staff and volunteers. Testing could occur in the form of surveys completed online by staff or volunteers (see pg. 12).**

Q8. As you mentioned in our discussion, the assessments will most likely be held towards the end of the process. Does the usability testing require a fully designed and developed website or can a wireframe (i.e. - sites that have most of the functions of the finished site, minus the finalized design, css etc.) version be used?

**A8. Audience assessment will be used primarily to identify issues with website navigation, basic functionality, visual/design components, and cross browser compatibility. The vendor should use these goals to determine the extent to which the website must be finalized before assessment takes place. We envision that the website will be close to completion at the time of audience assessment.**



- Q9. Who is in charge of content loading? As we understand it , OSER is in charge of providing the content so we want to verify that the vendor will load content.
- A9. The vendor is in charge of content loading. OSER will provide the majority of the text, graphic, and video (if applicable) content to the vendor to incorporate in the site.**
- Q10. How is user participation currently tracked/managed for the Green Homes Challenge program?
- Q10. We currently use a Microsoft Access database to track participation. Information tracked for each household that includes homeowner name, contact information, interest, type of support requested, affiliated community referral source, demographics, Challenges engaged in (Power Saver, Green Leader, Renewable Star), certifications obtained, and specific steps completed (e.g. completed energy audit). We also track each contact with the household.**
- Q11. We would like to get a better understanding of how much automation needs to be built into the website. What staff is currently dedicated to this program currently? We understand the hope is for the website to eventually help sustain the program beyond the life of existing funding. Is there a current plan for the resources you might dedicate to maintenance of this website in the future?
- A11. Currently, funding allows for staff to coordinate the Green Homes Challenge until 2014 who will use Challenge Live extensively during 2013 and 2014 to engage households and extract data on engagement. In addition, database and web hosting was included for two years as part of the contract to help sustain it. The office is currently developing plans for future funding and programs that will continue to take advantage of and utilize the materials and products developed for the Green Homes Challenge.**
- Q12. Can you provide any audience research or feedback on the program so far? In a video on your current website, Lisa Orr mentions informal surveying of audiences and we ask if the video is available to us? What are some specific examples of feedback you've received by participating households?

**A12. OSER applied for funding to create Challenge Live based on formal and informal feedback from Green Homes Challenge participants. Some of the problems we've found with our current methods and mostly hard-copy materials include: issues with distributing hard-copy materials, difficulty reaching participants to get updates on progress, difficulty navigating through program steps and knowing how to certify, lack of motivation/time to fill out and hand in certification forms even if many actions were completed. From experience talking with people, the biggest problem seems to be that people want to do it but are just too busy. When people do find the time, it could be easy to get deterred by a long handbook to read through or a certification process that seems too complicated.**

**Here are some survey results specifically about the Power Saver Challenge: 56% of participants have good intentions but are too busy; 24% are not organized enough to make it a priority; 15% need someone to help them and keep them motivated; 28% need help because they are not handy and lack the tools and know-how; 30% don't know where to start, what to do, or how to do it; 31% have experienced product overload and don't know how to choose; 21% are worried about loss of comfort and lifestyle preferences; 53% think it is too expensive for their budget; and 18% have the delusional attitude – they think green therefore they are green.**

**Q13. We understand that Challenge #3: Be A Renewable Star has not yet been launched, but will be part of this website. How does the content and household process for the existing challenges compare to what is planned for the Renewable Star Challenge?**

**A13. OSER plans to have the text for each Renewable Star action prepared by the time the Contract is awarded. Renewable Star will only have a few actions (e.g. install solar PV, install solar hot water, install geothermal, install wind, purchase renewable energy through a utility), in comparison to Power Saver and Green Leader which have many more. The text for Challenge Live will be short for each action. The hard copy handbook will have a chapter on each type of renewable system with much more extensive information. We hope to add a link to a PDF for each chapter to the appropriate action on Challenge Live so that people who want more information can easily view it. To certify in Renewable Star, a household will need to register for the Green Homes Challenge, take the pre-survey, complete one action, and hand in their certification form.**



- Q14. In section 2.2.1-What is the size of the OSER team with which the contractor will work at the initial meeting and throughout the project?
- A14. The contractor will communicate primarily with Nicole Robinson the Energy Efficiency Access Project Coordinator (EEAP). The Green Homes Challenge Coordinator, Sustainability Program Coordinator, and Office Manager will also participate in some meetings and provide input throughout the process. At least three of these OSER staff members will need to be trained on the site use and maintenance. A representative of IIT may attend as well.**
- Q15. In Section 2.2.1.5 -OSER will submit website content to the Contractor. Will the content be ready for the first meeting? Can we assume that it is editable and malleable based on the information architecture and planning for the site?
- A15. OSER plans to have the content prepared for the first meeting. The majority of the content will be the graphic and text for each action. We do not foresee much editing required for the action text, but in general, the content is editable and malleable based on the planning of the site.**
- Q16. In Section 2.5-Incorporate elements of Green Homes Challenge branding. Are formal branding standards in place and available to the contractor?
- A16. OSER has a set color palate and logos for the Green Homes Challenge, Power Saver, Green Leader, and Renewable Star. Vendors can view the Power Saver Handbook and Green Leader Handbook PDFs available on [www.FrederickCountyMD.gov/GreenHomes](http://www.FrederickCountyMD.gov/GreenHomes) to get a better idea of the design style used for the program materials.**
- Q17. In Section 2.4 - Mentions evaluation of how existing participants will be transferred to the new site. How does the current site data exist? CMS? Database?
- A17. Currently the participant data exists in a Microsoft Access database.**
- Q18. In Section 7.3.2 - Modern websites cannot be fully supported in IE6 and IE7, but the site would still be functional. Is that your expectation?
- A18. Our expectation is to make the site as functional as possible for all commonly used browsers.**

Q19. In Section 7.3.3 - Mentions basic mobile platform (iPhone) functionality so can we assume that this refers to the ability to view and use the website on a mobile smartphone (iOS or Android)? Or are you looking for the creation of a mobile-specific website?

**A19. We are not looking for creation of a mobile-specific website or app. Our hope is that the site can be viewed on most smart phones and be interactive and functional, if possible, from smart phones.**

Q20. In Section 7.5.3- In what format do you need the dynamic printable certifications, PDF or a printable webpage?

**A20. We have not specified the format of the printable certificate. The contractor should choose a format that is user-friendly and compatible with all browsers.**

Q21. In section 7.5.7-Can we assume that OSER would provide the copy for the Privacy Policy and Website Disclaimer?

**A21. Yes.**

Q22. In section 7.5.7.4 -Website analytics are usually handled by 3rd party services so would something like Google Analytics reporting be a reasonable expectation?

**A22. Yes.**

Q23. In section 7.10.2 -Are you looking for in depth code documentation, or a higher level documentation on how to manage the site through administration tools?

**A23. We are looking for a user-friendly system for website management.**

Q24. In Section 8.1.2.5.7 – Specifies three pages maximum for the bulk of the proposed approach, several lists and subcontractor descriptions. We respect the need for brevity, but will not be able to give you much of this information in a useful format within three pages. Is there any flexibility here?

**A24. Yes, but vendors should still focus on providing the necessary information and details in a concise matter.**



Q25. I understand this is a government project and has to be in compliance with ARRA. Would you please clarify if the sourcing of the work is allowed or not outside the US borders? Or is it necessary to perform the work onshore (within US borders)?

**A25. Please see answer to question #1.**

Q26. During the pre-proposal conference, you mentioned there is an existing PDF (handbook) for people to download on the site so please point me to that location/URL.

**A26. Power Saver Handbook:**

**[http://www.frederickcountymd.gov/documents/6616/6617/6628/oes\\_ps\\_hbFINAL%20Spring%202012\\_201206221228345763.pdf](http://www.frederickcountymd.gov/documents/6616/6617/6628/oes_ps_hbFINAL%20Spring%202012_201206221228345763.pdf)**, Green

**Leader Handbook:**

**<http://www.frederickcountymd.gov/documents/6616/6617/6628/FINAL%20GL%20handbook.PDF>**

Q27. The RFP states “the contractor must meet periodically with the EEAP Coordinator and other OSER staff whenever reasonably requested to do so.” Can you give an estimate of how many meetings you anticipate?

**A27. This will depend somewhat on the selected contractor’s approach to the project, but we anticipate having at least an initial meeting and a meeting to train OSER staff on use of the website. In between, other key points at which we may meet could include discussion of architecture and technology needs, contractor’s attendance at focus groups, and analyzing audience assessment results. We estimate between 2-6 meetings, depending on the contractor’s approach and performance. If the contractor is local, we would expect to meet in-person. If the contractor is not local, we can arrange phone and/or televised conferences.**

Q28. RFP, 1.4 reads, The website will also allow for program sustainability beyond the scope of GHC funding and therefore should require little maintenance by staff beyond its initial inception.” Will you have a technical person on staff to help you maintain the site?

**A28. The current Sustainability staff will maintain the website for at least the first year. None of the Sustainability staff are experts in IIT, although there is some basic experience with website maintenance. We will be able to consult occasionally with the County’s IIT staff, but will not be relying on them for maintenance of the website.**

Q29. How many OSER staff will need training on how to manage the site and how to use the back-end infrastructure?

**A29. Approximately 3-5 OSER staff members will require training.**

Q30. May the contractor use usertesting.com, which employs a wide variety of user testers, to complete usability testing? Or, must the testing be performed exclusively with users identified by OSER? If the latter is true, does all user testing need to be performed in person (and if yes, where?), or may we perform a number of sessions online/remotely?

**A30. OSER is open to ideas about user testing from vendors. It seems that usertesting.com requires a fee; if the contractor is including this fee in its price proposal and invoicing the County for it, then we will not be able to count volunteer time of users toward in-kind match for our grant. We would prefer that the contractor choose a method of user testing that allows us to count volunteer time; if this is possible through an online service like usertesting.com, then that would be acceptable and would reduce the amount of volunteer coordination required of OSER staff. The testing does not have to be performed exclusively by users identified by OSER, but again, we would like to be able to count volunteer hours for whoever does perform the testing. Testing does not need to be performed in person. We envision user testing occurring primarily through online sessions/remotely. However, we would like for the focus groups to occur in person.**

Q31. The RFP states: "The Contractor shall also provide a training reference/resource via DVD or another format agreed upon by the Contractor and EEAP Coordinator". May the DVD be a recording of the training delivered to OSER?

**A31. OSER is open to ideas and approaches for training. We would like to have some reference source, whether it is video or written material, that allows us to maintain the website independently. If the contractor thinks a recording of the training would be adequate, then that would be acceptable. Contractors may even choose to provide both a DVD and a written instruction manual.**

Q32. Section: 7.5.2 Tracking Steps and Actions: Of the 160 actions in total, will OSER provide the list and structure of actions?



**A32. Yes. We plan to distribute content to the selected contractor at the initial meeting. All content for steps and actions will be provided, as well as certain other content such as information about the program and office.**

**Q33. Section: 7.5.4 Existing Green Home Challenge Forms. We were not able to locate all forms on the existing site.**

**<http://www.frederickcountymd.gov/index.aspx?NID=4407>**

**Can you guide us in the right direction on: the number of forms, and URL to access forms for quoting purposes?**

**A33. We envision that the pre-survey**

**(<http://www.cvent.com/Surveys/Welcome.aspx?s=867ad77d-9112-43f9-aa59-224acc3c55c2>) will continue to be completed through cvent.com and not as a**

**form on Challenge Live. The original RFP said that the registration form**

**(<http://www.cvent.com/Surveys/Welcome.aspx?s=306a4eb3-7109-4f11-9da0-f3e15eb24e51>) would also continue to be done through cvent.com, but we are**

**considering now that it may be better to have it done through Challenge Live as part of the user account form (see edit to pg. 15 of RFP in Addendum). We are flexible on this question and open to the contractor's suggestions.**

**Challenge Live will definitely need to have a form for creating a user account; that may include information such as household name, contact person name, email address, home address, and phone number. We would also like to have a Contact Us form, for questions, comments, and concerns.**

**Other forms to incorporate into the site include the Energy Saving Action Plan**

**([http://www.frederickcountymd.gov/documents/6616/6617/6628/Energy\\_Saving\\_Action%20Plan%201.PDF](http://www.frederickcountymd.gov/documents/6616/6617/6628/Energy_Saving_Action%20Plan%201.PDF)), Powerware Party Planning Form**

**([http://www.frederickcountymd.gov/documents/6616/6617/6628/Powerware%20Party%20Planning%20form%20Spring%202012\\_201207031504485137.pdf](http://www.frederickcountymd.gov/documents/6616/6617/6628/Powerware%20Party%20Planning%20form%20Spring%202012_201207031504485137.pdf)), and Green Ambassador Application Form**

**([http://www.frederickcountymd.gov/documents/6616/6617/6628/Green%20Ambassador%20Form\\_201207031505268421.pdf](http://www.frederickcountymd.gov/documents/6616/6617/6628/Green%20Ambassador%20Form_201207031505268421.pdf)).**

Q34. There are a number of references to non web related elements. For example on page 63"(iii) The cost of iron, steel, or manufactured goods shall include all delivery costs to the construction site and any applicable duty." The assumption is we will be skipping all areas not related or specific to this specific project and skipped in our response to the RFP.

**A34. Yes that is correct**

Q35. Page 54: Reporting and Registration requirements Clause: "The Recipient and Sub-grantees shall adhere to the following reporting requirements in addition to any other reporting requirements listed herein, in an MOU or any of its attachments, or otherwise made known to the Recipient or Sub-grantee." Please clarify the clause because our assumption is this relates to your organization/grantor and not the Developer.

**A35. Please see pg. 16 of the RFP for information about the selected contractor's reporting requirements. The contractor must submit a monthly report to OSER that includes a summary of work completed that month and adherence to the proposed timeline; this report may also include jobs created and retained and job hours supported by the ARRA funds (pg. 55), which OSER may report to the grantor.**

Q36. Page 12: Focus Groups: There is reference to 2 focus groups: Staff and volunteers; Is the developer responsible for bringing the volunteers? (Is the developer responsible for soliciting and gathering all volunteers or just overseeing the actual testing/analysis of the focus group?

**A36. The contractor is not responsible for soliciting and gathering volunteers for focus groups and website testing. However, we are open to hearing contractors' ideas about focus group and website testing volunteers and participation. We are also open to suggestions about the role that the contractor would like to play in website testing and focus groups. If the contractor selected is local, it may be beneficial for them to attend each focus group. If the contractor is not local, they should explain what role they can plan in focus groups and testing. We envision website testing occurring remotely/through online sessions.**



Q37. Cvent Form(s): Is there an API you need us to connect to for [cvent.com](http://cvent.com) or prefer linking via URL (on click user is taken to cvent form)?

**A37. The department plans on linking via URL.**

Q38. Do you require proposed work samples? (ex. layout of Home/Internal page)

**A38. We do not require submission of layout ideas with the proposal; OSER and the selected contractor will develop ideas for architecture and layout at the first meeting. However, we do however require inclusion of URLs for past websites developed.**

Q39. Is there any particular reason you want to keep forms on cvent vs. custom (utilize one source for better/easier management vs. one or more forms on cvent and rest custom developed).

**A39. The RFP does specify that we would like to keep the pre-survey and registration forms on cvent. However, we have been considering that it might be better to have the registration information included as part of the user account creation form on Challenge Live to make it simpler for the user, and so included an edit to pg. 15 of the RFP as part of the addendum. We are open to suggestions from vendors on the most effective method for the registration. However, in regards to the pre-survey, we feel that it is too long to put on Challenge Live, and so would like to keep it on cvent. We may even cease to use it once the EPA grant funding for the Green Homes Challenge is finished, so we do not want to spend the time/money incorporating it into Challenge Live.**

Q40. Will there be any communication or exchange of data between cvent.com and the Challenge Live website?

**A40. Please refer to the revision on pg. 15 of the RFP in the addendum. We would like for the registration form to be part of the user account creation on Challenge Live, rather than having it being in cvent. We still plan for the pre-survey to stay on cvent. Especially with the registration taking place on Challenge Live, we do not see a need for communication between cvent and Challenge Live. If the contractor sees a definite need for it, we would be open to suggestions.**

Q41. In Section 7.5.5 of the RFP – Motivational, Interest, and Sharing Features: (tracking of CO2 emissions reductions, energy savings, financial savings, recommendations for similar actions, automatic email reminders, ways for users to invite friends to learn about the Challenge and use the website, listing of certified and registered households, listing of leading households who have achieved the most points or CO2 reductions, ways for users to tell their story and share their experiences with the Challenge, and a mechanism for showing users the total number of participating and certified households.) Are each of the elements individual requirements or suggestions?

A41. **None of the above elements are requirements; all of them are possibilities/suggestions. Out of the features listed above, we would really like to incorporate listing of certified households, ways for users to invite friends, ways for users to tell their story and share their experiences, and a mechanism for showing users the total number of participating and certified households. We are also open to new suggestions of features to include.**

Q42. The county is requesting a fixed price, which elements are required and which are optional?

A42. **All of the motivational, interest, and sharing features are optional, but vendors may want to consider what features fit within their vision of the project, timeline, and feasibility. In particular, we would recommend that vendors include those items listed above - listing of certified households, ways for users to invite friends, ways for users to tell their story and share their experience, and a mechanism for showing users the total number of participating and certified households (Please also refer to answer to question #46).**

Q43. In Section 7.5.6 Links to other Green Homes Challenge online media: Can the contractor make recommendations for additional social networking integration in the project?

A43. **Yes.**

Q44. Does the proposal have to be in hard format or can it be electronic?

A44. **The proposal must be submitted in hard format.**



Q45. Will the county require a website style guide once the project is completed?

**A45. A website style guide is not required, but if the contractor thinks it is essential, it could be included in the project scope. Some form of instruction on how to maintain the site, whether it's in a form of a DVD, written material, or other format, is required.**

Q46. We are required to submit FFP pricing for tasks which ask vendor suggested solutions and includes government suggestions for "possible" elements. In order to provide a fair cost comparison environment, will the County identify the actual required "elements" or "functionality" for these items?

**A46. All of the tasks listed on pg. 11 – 13 and features listed under Contractor Requirements (pg. 13 – 17) are required, except for the items in 7.5.5. The items listed in 7.5.5 are possibilities and suggestions. Out of those features, those that we would most like to see incorporated include listing of certified households, ways for users to invite friends, ways for users to tell their story and share their experiences, and a mechanism for showing users the total number of participating and certified households. Vendors should consider what features fit within their vision of the project, the timeline, and the feasibility. If bidders think of new features that were not included in the RFP that they think would improve the functionality of the website, they can include these in their proposal if they choose.**

Q47. Understanding that price is being used as an evaluation criteria, will the County provide a more defined functionality and elements required listing for vendors to provide Firm Fixed Pricing?

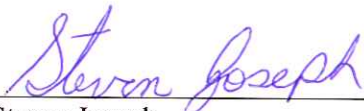
**A47. Please see answer to questions #42 and 46. The only features not required are those in section 7.5.5.**

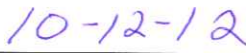
Q48. RFP section 11.14 "The Contractor shall not commence work under the contract until evidence of all required coverage is received by the County." What documentation is required for the insurance requirements?

**A48. Please review Section 11, Insurance Requirements, in the RFP that includes the insurance coverages the Contractor must obtain prior to commencing work. Further assistance can be obtained by contacting your insurance company.**

In Document B, Specifications replace section 7.5.4 on page 15 in its entirety with the one listed below:

Page 15 Section 7.5.4 Existing Green Homes Challenge forms will be created as online forms, excluding the Green Homes Challenge Pre-Survey, which will continue to occur through cvent.com. Challenge Live online forms may include the Green Homes Challenge Registration (as part of the creating a user account), Energy Saving Action Plan, Powerware Party Planning Form, and Green Ambassador Application Form. The Challenge Live Website will also include a customer service form on the Contact Us page that will allow users to submit comments and questions to OSER staff.

  
\_\_\_\_\_  
Steven Joseph  
Procurement Analyst III

  
\_\_\_\_\_  
Date

**Please sign below to acknowledge this addendum and return with your proposal.**

\_\_\_\_\_  
Name of Contractor

\_\_\_\_\_  
Date Signed